

Helpful Hints for Speedier Processing and Fewer Returns of TAKE CHARGE Applications

1. **Accuracy:** Typos and misspellings will complicate the application process. If we can't get a match with the name and the SSN, the application will come back to you. If we have the client already in the system, under a different spelling of their name, the application will come back to you for clarification. Double checking that you have the correctly spelled name and have the correct SSN on the front end of the process will save lots of time on the back end
2. **Name Changes:** If the client has changed their name recently or since they last applied for TAKE CHARGE, please make a note in the comment box and give us the old name.
3. **Social Security Number:** If the client does not know their SSN, you must mark on the box at the end of the application that you gave them the form to take to the Social Security Office to obtain their SSN. The application is not valid unless you do this. Remember to keep a copy of that form in their application.
4. **Address Field:**
 - The address will be checked to see if it is a valid Washington State address. If the client lives in an apartment building, be sure that there is an apartment number on the address. The residential address **cannot** be a Post Office Box or an out-of state address.
 - If the client is homeless, please mark "Homeless" in the residential address field. A Post Office Box can be used in the mailing address field. Do not leave the residential address blank.
 - Be sure that the client understands that if they do not want any mail coming from DSHS to go to their home address, they can give a confidential mailing address. It can be the clinic or a friend's house or somewhere else.
 - If they request that their Medical ID card comes to the clinic, they must sign a form stating that this is their request.
 - If the client is 17 or under and have put their home address in the mailing address, please verify in the comment section that it is indeed, OK, to use their home address. You would be amazed at how often we hear that it was a mistake to put in the home address and that there would have been serious consequences for this teen had the mail from DSHS gone home. Your extra comment is our assurance you have double checked this.
5. **Income:** The most common reason that an application is returned to the clinic is because the amount of income that we see reported by the Employment Security data base is more than the allowed amount for their family size and more than they reported on their application. When a potential client calls and makes an appointment, let them know that if they are applying for TAKE CHARGE we will need to have precise information about their income. Proof of income is not

required, but if clients can review their recent paystub or bring one in, that will be helpful. Asking some key questions as you are assisting the client with the application will also save you lots of work later on.

- **Net Income vs. Gross Income:** Many clients don't understand this distinction. Depending on their deductions, their gross income can be quite different from what they take home. Most of us are far more aware what our net income is.
- **Weekly vs. monthly vs., yearly income:** Please verify with the client that the amount of income reported on their application is their *monthly* income. It is a **very** common mistake for clients to put the amount they receive on their paycheck, each week or biweekly.
- **Recent changes in income and/or employers:** Ask the client if they have had any change in income and or employers in the past quarter. It is helpful to have approximate dates of these changes. If they were cut back in hours or had a brief earlier period of overtime this is helpful information to put in the comment section and explains a discrepancy we might see between their reported income and what Employment Security states they were paid.
- **Tips and Commissions:** This income counts for eligibility. Be sure the client included income from these sources.
- **Other income:** If the client reports "Other" income over \$500, please put a note in the comment box as to the source of the "other" income.
- **Family size:** If a different family size was reported to DSHS when the client recently applied for other benefits (requiring proof of eligibility), the application will be returned to you for clarification. The client can only count themselves, their legally married spouse and dependent children under 18 years of age.

6. Checking to see if the client has been approved:

- Check the TAKE CHARGE data base frequently to see if the client has been approved or if the application has been returned with comments or questions. You can find this information in the Status Field. The sooner you clear up the questions about the returned applications, the more quickly we can pay you for those clients determined to be eligible.
- Billers should have inquiry access to check for approvals and PICs. Some billers are billing before the client has been approved and is in the system. This makes more work for everybody.

7. Use WAMED WEB:

- If the client has been approved, you can check WAMED WEB one week after the approval date for the client's PIC. If there is no PIC two weeks after approval, call us - there is a problem! We can get it fixed so you can bill for services. You **must** spell the client's name correctly and have the correct SSN or you will not find the client on WAMED WEB!